

Rotary District 6040

Global Grant Guidelines

Effective January 1, 2019 for the 2019-2020 Rotary Year.

Global Grant Requirements are ALL defined in The Rotary Foundation Terms & Conditions <https://www.rotary.org/myrotary/en/document/terms-and-conditions-rotary-foundation-districtgrants-and-global-grants-grants-awarded>

Your Global Grant Project **MUST**:

- Both Clubs and Districts must be “**GRANT QUALIFIED**” through the entire length of the grant, even if the grant crosses multiple Rotary years. See Page 2 for more information on grants qualification.
- Grant total budget must be **\$30,000 USD** or greater
- The Grant must align with one **TRF Area of Focus**
- The project must address an **important need identified by the community itself**.
- The project must have a long-term **SUSTAINABLE** impact.
- **Strengthen the community’s** capacity to meet its own needs.

You **MUST**:

- Apply through Rotary.org
 - Actively involve the benefiting community in the project
 - Partner with a club in another country
 - Qualify your club for global grants each year
 - Include a community needs assessment conducted by the host partner
 - Develop a project plan that includes a budget and financial management plan
 - Measure progress toward the outcome
 - Stay up-to-date on required progress and final reports.
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Information to help Clubs Navigate a Successful Global Grant *as an International Partner*

Definitions:

My Rotary – is your personal Rotary account at Rotary.org. Activating your My Rotary account is easy and is required to have access to grant tools and the application site. Through your My Rotary sign-on you can initiate a Global Grant application, check on the status, find great training documents and track the status of your application. Both Primary Contacts have full edit access to the grant through their respective My Rotary accounts. Activate your My Rotary account by selecting “Register for an Account” at Rotary.org.

DDF = District Designated Funds – These are the dollars our district has available to provide base funding for District and Global Grants. Funding varies by year based on the Annual Fund dollars contributed three years prior by our Rotarians and returned to our district to designate toward grants. The Global Grant Chair or D6040 DRFC can provide specifics on DDF availability. Currently, D6040 tries to provide \$5,000-10,000 of DDF for each Global Grant until DDF funds are exhausted each year. In Rotary Year 2019/2020 D6040 hopes to provide \$15,000-25,000 per grant until the funds are committed. DDF funding levels will be determined by our DRFC and D6040 Executive Committee based on the number of global grants in development. DDFs are not guaranteed and must be formally requested using a Letter of Intent. A multi-club Global Grant can only receive one allocation of DDF for the grant. Specifically, multiple clubs support does NOT multiply the potential DDF allocation. In the event that Global Grant applications exceed available DDF, preference will be given to:

- Projects submitted earlier in the Rotary year
- Clubs that participate in giving to The Rotary Foundation through Annual Fund-Share
- Clubs with a history of on-time final reporting for all District and Global Grants

D6040 LOI - Letter of Intent – Use this form to request D6040 DDF for your grant project **OR** notify the District Governor and District Rotary Foundation Chair of your grant (even if you don't request D6040 DDF). This form must be signed by both the D6040 Partner Club President and President-elect to assure club support of the project. DDF dollars will be reserved for 1 year to allow time for the project development and grant application submission. Any extension beyond 1 year for DDF requests must be communicated to the D6040 DRFC.

D6040 LOI requests can be submitted starting April 1st for each Rotary year but may not be approved until after 8/15.

TRF MOU – Memorandum of Understanding - the MOU is a contract signed by both sponsor Rotary Clubs (Host & International) and a representative of any partner organization. The contract lists key commitments to assure clear understanding prior to the grant application. Submitting the signed MOU is an early step in the TRF Global Grant process.

Matching Funds – TRF World Fund will match cash donations 50-cents per dollar and will match DDF dollar for dollar. Important Note - TRF does charge a 5% fee on all cash contributions to endow the fixed costs of processing TRF Global Grants. Karyn will help you calculate this cost in your funding plans.

Key Roles & Responsibilities -

TRF – The Rotary Foundation

RI – Rotary International

TRF RGO - Regional Grant Officer – A TRF employed professional grant officer dedicated to oversee all grant applications for a specific country or region. This individual will guide both primary contacts to help them develop an approved grant application and answer any questions the D6040 Global Grant Chair can't answer. Your D6040 Global Grant Chair can introduce you to your RGO.

6040 DRFC – District Rotary Foundation Chair - Cassy Venters. Specific to Global Grants, the D6040 DRFC brings your LOI (Letter of Intent) request for DDF (district designated funds) to our D6040 Executive Committee for review and consideration by the district executive council. If your DDF request is approved, these funds will be reserved for 1 year while you are developing the project details and application. The DRFC will authorize payment of DDF funds by TRF if your grant is approved. Cassy Venters cdventers@me.com 816-896-8248

D6040 GG (Global Grant) Chair – Karyn Eppler. Karyn will introduce you to your RGO, help you identify a solid global grant project, meet our D6040 requirements, navigate the TRF grant application process and guide you to submit timely reports to close the project. Karyn Eppler Eppler.karyn@gmail.com 816-985-2423

Global Grant Sponsors:

- **International Partner Club** - the Rotary club not in the receiving country that is leading the financial support and is the lead international partner for planning the project.
- **Host Partner Club or District** - the club or district that is in the community receiving the grant benefits.

Grant Writers/Project Leaders:

- **International Primary Contact** - one designated Rotarian in the International Partner Club that will coauthor the grant with the Host Primary Contact. The role includes working closely with the Host Primary Contact via email to develop solid grant project details by asking the right questions and seeking guidance from TRF Regional Grant Officer to assure the grant application is complete when submitted. A critical responsibility is assuring the project has a very strong Host Primary Contact as the key project leader and grant partner before submitting an application for approval.
- **Host Primary Contact** - one designated and trusted Rotarian in the Host Partner Club or district that will co-author the grant. Their responsibilities are significant and typically include assurance of the following: performing a community needs assessment, getting all project budget quotes, develop a detailed budget, open a Grant Dedicated bank account, receive all funds from TRF, track and pay all grant invoices, coordinate with the community to communicate training/education/public awareness, coordinate measurements of success, provide final report of success measures and proof of all invoices, payments and bank statements.

This individual can, of course, delegate tasks, but must be very detail oriented, a good communicator and willing to invest the needed time to make the grant a success.

Global Grant Process Steps:

1. **My Rotary Account.** Register your own My Rotary account at Rotary.org
2. **TRF Guide to Global Grants.** Review the TRF Guide to Global Grants. From [your My Rotary account go to Foundation / Grant Center to see this and other great downloadable reference documents.](#)
3. **TRF Terms and Conditions.** Review TRF Terms and Conditions to fully understand what is allowed as a grant project. See link on Page 1.
4. **Build the Global Grant Team:**
 - a. **Host Partner.** Contact our D6040 Global Grant Chair (Karyn Eppler) to share your project idea and Host Partner. You may also contact Karyn to help develop your project idea or find Rotary contacts in a Host country if needed.
 - b. **Primary Contact.** Ask Host Club or district to designate a Primary Contact. This will be an important, the *most* important, partner in a successful project
 - c. **Secondary Contacts.** Both Primary Contacts will need to have two back-ups (called Secondary Contacts). The secondary contacts need to stay informed in case the Primary Contact cannot fulfill their duties at some point in the process.
 - d. **Administrative Authorizations.** Ask Host Primary Contact to electronically introduce you, Cassy & Karyn to the Host Sponsor Club or district President, Host District Governor and Host District DRFC. This is important to assure full support and no surprises to those that have responsibility to authorize DDF in both districts.
 - e. **TRF Regional Grant Officer.** Introduction to your TRF Regional Grant Officer – Karyn can do this electronically at any time in the process. Your RGO can provide guidance to help you develop a solid grant project and application. This is a very important relationship and the RGO’s mission is to get grants approved, implemented, and closed. Your RGO will be available for questions through the process until the final report is complete and the grant is closed. You can engage them at any time, most times an early review of the draft application is helpful and will save you time.
5. **Community Needs Assessment.** Ask your Host Partner club or district to conduct a community needs assessment. This will be required prior to submitting a grant application. The Community Needs Assessment will identify several community needs and the International and Host Partners should identify the greatest need that meets TRF grant guidelines, is technically feasible, is not being addressed by another organization and has a scope and budget that the two partner clubs feel well equipped to address.
6. **Area of Focus:** Identify which Area of Focus your Grant aligns with. The Area of Focus Policy Statement is a useful reference.
<https://www.rotary.org/myrotary/en/document/areas-focus-policy-statements>
Note – it is better to only pick one Area of Focus to reduce complexity of the grant Final Report requirements. When you have identified your grant Area of Focus, Karyn can provide you the current TRF guideline for Global Grant Funding based on that Area of Focus. This document is priceless in building a solid project.
 - a. Peace & conflict prevention/resolution
 - b. Disease prevention and treatment
 - c. Water and Sanitation
 - d. Maternal and child health
 - e. Basic education and literacy
 - f. Economic and community development
7. **D6040 Letter of Intent.** Submit D6040 Letter of Intent – submit a signed LOI form to Karyn to identify the project, your Host partners, demonstrate your club support, request D6040 DDF and notify your club president, district governor and district Rotary foundation chair of the global grant. Karyn will share your

signed LOI with our DRFC and the D6040 Executive Committee will review and provide feedback and/or approval. [https://www.rotary6040.org / Foundation / Grants](https://www.rotary6040.org/Foundation/Grants) for the LOI form.

8. **Begin to Draft On-line Global Grant Application.** Begin application – In your My Rotary account you can initiate a grant application at Foundation/Grant Center/Apply for a Grant. Once you begin the draft on-line application, both Primary Contacts, our D6040 DRFC, D6040 GG Chair and your RGO can all view the application details and provide edit suggestions.
9. **TRF Memorandum of Understanding.** Complete TRF Memorandum of Understanding (this is different than the D6040 MOU required for Grants Qualification Training) – attach the signed form to your TRF Global Grant application. Karyn can help you identify partner organizations and list responsibilities for both sponsoring Rotary Clubs (Host and International) and for any Partner Organizations.
10. **Complete the TRF On-Line Grant Application.** Enter all the required Grant Application details on-line. Direct questions to Karyn or your RGO. Note that your Budget total and Funding totals must be equal. Karyn can help you calculate the matching funds to assure the budget and funding totals are the same.
11. **Monitor Outcomes.**
12. **Prepare Progress and Final Reports.** Information on report formats and deadlines is on the TRF On-Line Grant Application.

FAQs:

How does my club become Grant Qualified?

- Complete required Grant Management Training by April 1, 2019.
TRF requires the Club President to attend Grant Management Training each year. Club Grant Managers must complete this training every-other-year. The D6040 grant training schedule will be sent to Club Presidents, President-Elects, 2018 Grants Managers and Foundation Chairs by January 1, 2019 and posted on the D6040 website. Webinars are one option and require an open book test to complete.
- Your 2019-2020 Club President must submit a signed D6040 Memorandum of Understanding to D6040 DRFC (Cassy Venters) by April 1, 2019. This document specifies your club's commitment to follow financial guidelines of The Rotary Foundation policy.

When should I apply for a Global Grant? You can apply for a Global Grant at any time in the Rotary year. However, your opportunity to receive D6040 DDF is increased if you submit your Letter of Intent (LOI) earlier in the Rotary year. The completed LOI requesting DDF can be submitted as early as April 1st for consideration in the next Rotary year.

How do Matching Funds work?

All Club/Rotarian/non-Rotarian/Corporate/Non-Profit donations are considered "Cash Donations" by TRF. These are matched 50-cents for every \$1 donated. DDF allocated to the grant are matched \$1:\$1. An example: Your club/Rotarians/community contribute \$12,000. TRF World Fund Match will add \$6,000 toward the grant funds. The Host Partner Club contributes \$1,000 and will be matched \$500. Your grant was approved by D6040 for \$15,000 in DDF. The World Fund match will be an additional \$15,000. Grant funding total in this example ... \$12,000 + \$6,000 + \$1000 + \$500 + \$15,000 + \$15,000 = \$49,500.

How long does it take to develop a Global Grant? The Global Grant process has several steps - project definition, application/approval, implementation, success measures and final report. Your club or district should be prepared to be involved with the Global Grant for multiple years.

How long does it take for TRF to approve a Global Grant? This depends on the quality of the application and how thoroughly the applicants answer questions on the application. The TRF Regional Grants Officers do an excellent job of communicating with primary contacts to address questions and are timely in their review and approval.

How is a Global Grant completed? TRF approval of the Final Report, including all Success Measures, is the step that completes and closes the Grant successfully. Failure to complete this final step would mean both sponsoring clubs would no longer be grant eligible for the foreseeable future and could require all funds to be returned to TRF.